**Product Requirement Document (PRD) – SaaS HRMS**

Project Name: SaaS-based Human Resource Management System (HRMS)  
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# Document Control

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# 1. Introduction

Our **SaaS-based HRMS** is a multi-tenant cloud platform that automates the entire employee lifecycle — from recruitment and onboarding to payroll, performance, and compliance. It empowers employees and managers with self-service tools, ensures global compliance, and provides actionable insights into the workforce for data-driven decision-making.

**Goals:**

* Simplify and digitize HR operations to reduce manual effort.
* Provide a modern **Employee Self-Service (ESS)** and **Manager Self-Service (MSS)** experience.
* Ensure compliance with global data security and labor standards (GDPR, ISO, SOC2).
* Deliver workforce analytics and dashboards to support data-driven decision-making.

**Target Audience:**  
- HR Admins & Managers  
- Employees (all levels)  
- Business leaders  
- Compliance & Finance teams

# 2. Problems

* Onboarding/offboarding is manual, slow, and error-prone.
* Recruitment lacks automation and actionable analytics.
* Payroll errors create compliance risks.
* HR is overloaded with repetitive employee queries.
* Employees face fragmented systems and poor user experience.
* Managers lack real-time visibility into workforce data.

# 3. Opportunities

**Each opportunity directly addresses the problems identified above, ensuring that the HRMS not only digitizes HR processes but also enhances efficiency, compliance, and user experience :**

* Automate onboarding/offboarding with digital workflows and e-signatures.
* Use AI-driven recruitment tools and dashboards to optimize hiring.
* Ensure payroll accuracy with automation and compliance-ready processes.
* Empower employees and managers with ESS/MSS self-service portals.
* Deliver a unified, mobile-friendly HRMS with seamless integrations.
* Provide role-based dashboards and analytics for real-time insights.

# 4. User Personas

**1. HR Admin**

* Role: HR Administrator / HR Executive
* **Needs:** o Simplify onboarding and offboarding workflows  
   o Maintain accurate employee records and compliance  
   o Automate payroll, leave, and document management  
   o Generate quick reports and insights for management
* **Behaviors:** o Uses the HRMS daily for employee lifecycle management  
   o Frequently updates employee data and verifies documents  
   o Coordinates with IT, Finance, and Compliance teams  
   o Relies on dashboards and alerts for compliance tracking
* **Pain Points:** o Manual data entry and repetitive employee queries  
   o Difficulty ensuring compliance across multiple regions  
   o Time-consuming onboarding processes  
   o Managing large volumes of documents manually

**2. Manager**

* **Role**: Team Manager / Department Head
* **Needs:** o Approve/reject employee requests (leave, claims, updates) quickly  
   o Monitor team performance, attendance, and workload in real time  
   o Assign and track tasks efficiently  
   o Access customizable reports for team insights
* **Behaviors:** o Logs in frequently to approve requests and monitor performance  
   o Uses dashboards and reports to analyze KPIs  
   o Delegates tasks through MSS tools  
   o Responds to alerts for attendance or performance issues
* **Pain Points:** o Lack of real-time visibility into team data  
   o Using multiple fragmented systems for approvals  
   o Delayed insights due to manual reporting  
   o Difficulty in spotting early performance issues

**3. Employee**

* **Role**: Employee / Team Member
* **Needs:** o Update personal information and official records  
   o Submit leave requests, claims, and training enrollments  
   o Access payslips, tax forms, and company announcements  
   o Use mobile-friendly tools for quick HR interactions
* **Behaviors:** o Logs in occasionally (weekly/monthly) via web or mobile app  
   o Uses ESS for routine HR tasks like leaves, claims, and downloads  
   o Engages with company announcements and training modules  
   o Relies on mobile push/email notifications for updates
* **Pain Points:** o Dependency on HR for routine requests  
   o Delayed approvals for leaves and claims  
   o Lack of transparency in request/approval status  
   o Poor user experience in legacy HR systems**.**

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# 5. User list from the User Persona

**Primary Users:**

1. **HR Admin / HR Executive**
   * **Needs:** Simplify onboarding/offboarding workflows, maintain accurate employee records, ensure compliance, and reduce manual queries.
   * **Behaviors:** Uses HRMS daily to manage employee lifecycle, documents, and reporting.
2. **Manager / Department Head**
   * **Needs:** Approve/reject requests (leave, claims, updates), track team performance & attendance, assign/monitor tasks.
   * **Behaviors:** Frequently uses dashboards, reporting tools, and task management features.
3. **Employee (All Staff Levels)**
   * **Needs:** Update personal information, access payslips, submit leave & expense claims, enroll in training, receive company updates.
   * **Behaviors:** Logs in occasionally (weekly/monthly), uses the ESS portal or mobile app for routine HR tasks.

**Secondary Users:**

1. **Business Leaders :**
   * **Needs:** Access HR dashboards, workforce analytics, compliance reports, and insights for decision-making.
   * **Behaviors:** Uses HRMS for high-level strategic reviews, with less frequent but data-driven use.
2. **Super Admin :**
   * **Needs:** Ensure GDPR/ISO/SOC2 adherence, manage data privacy, and review audit logs.
   * **Behaviors:** Periodically reviews reports, audit trails, and system compliance settings.

# 6. User Stories

The following high-level user stories represent core use cases across modules. A complete list of detailed stories (UC-001 to UC-065) is maintained separately for development reference.

## 6.1 User Onboarding & Employee Management

* *As an HR Admin, I want to generate and manage* ***digital offer letters with e-signatures****, ensuring faster, paperless, and legally compliant onboarding.* (UC-001, UC-002)
* *As a Candidate, I want to* ***submit pre-joining documents online*** *so I can complete onboarding remotely through the SaaS platform.* (UC-003)

## 6.2 Recruitment & Talent Acquisition

* *As an HR Recruiter, I want to* ***post jobs to multiple boards*** *and parse resumes using AI so I can quickly source the best candidates.* (UC-014, UC-016)
* *As an HR Manager, I want to* ***track time-to-hire and recruitment funnel metrics*** *so I can optimize hiring efficiency across departments.* (UC-020)

## 6.3 Leave & Attendance Management

* *As an Employee, I want to* ***apply for leave and view approval status online*** *so I have transparency without needing HR intervention.* (UC-023)
* *As a Manager, I want to* ***monitor attendance via biometric/geo-fencing integration*** *so I can ensure workforce presence in real time.* (UC-024)

## 6.4 Learning & Development

* *As an Employee, I want to* ***self-enroll in training courses*** *from a centralized SaaS LMS so I can upskill at my own pace.* (UC-038)
* *As an HR Admin, I want to* ***track certifications and learning completion*** *so I can ensure compliance training is completed on time.* (UC-041)

## 6.5 Manager Self-Service (MSS)

* *As a Manager, I want to* ***access dashboards and drill-down reports*** *on team performance so I can make data-driven decisions.* (UC-043, UC-045)
* *As a Manager, I want to* ***receive alerts for attendance and performance issues*** *so I can address them proactively.* (UC-046)

## 6.6 Security & Compliance

* *As a Compliance Officer, I want to* ***enforce role-based access controls with audit logs*** *so I can ensure data privacy and meet GDPR/ISO/SOC2 standards.* (UC-062, UC-064, UC-065)

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# 7. Use Cases & Requirement Summary

| **Module** | **Submodule** | **Requirement (Use Case)** | **Use Case Ref** |
| --- | --- | --- | --- |
| **Employee** | ESS – Personal Data Mgmt | Update personal info, upload ID proofs, and auto-sync with HR database | UC-048 |
| ESS – Payroll & Benefits | Securely download payslips with encryption | UC-050 |
| ESS – Requests & Notifications | Apply for leave and view approval status in real-time | UC-023 |
| L&D – Course Mgmt | Self-enroll in training, access the library, and complete assessments | UC-036, UC-038 |
| **Manager** | MSS – Team Oversight | Monitor KPIs, performance trends, and skill gaps | UC-043 |
| MSS – Task Assignment | Assign/reassign tasks, set priorities, receive deadline reminders | UC-044 |
| MSS – Reporting & Alerts | Dashboards, exports, attendance/performance alerts | UC-045, UC-046 |
| **HR Administrator** | Onboarding | Generate and manage digital offer letters with e-signatures | UC-001, UC-002 |
| Pre-joining Docs | Collect and verify candidate documents with automated reminders | UC-003 |
| Employee Profile Mgmt | Centralized employee profile: contacts, dependents, employment history | UC-004 |
| Document Management | Upload, version control, rollback, and compare HR/employee docs | UC-009 |
| Offboarding | Conduct exit surveys, track assets, and auto-generate final settlements with compliance checks. | UC-011, UC-012 |
| Recruitment | Post jobs to multiple boards, manage branded pages, and schedule postings | UC-014 |
| Candidate Management | Parse resumes using AI, tag skills, and detect duplicates | UC-016 |
| Recruitment Analytics | Track time-to-hire, funnel metrics, and department-level insights | UC-020 |
| Shift & Scheduling | Create rosters, manage overtime alerts, and approve shift swaps | UC-025 |
| **Super admin/ Finance** | Payroll & Tax Mgmt | Automate salary calc, multi-currency payroll, region-specific tax rules | UC-030 |
| Expense Claims | Submit mobile claims, OCR receipts, and apply auto-approval rules | UC-031 |
| Audit & Compliance | Audit logs, tamper-proof storage, GDPR/ISO/SOC2 compliance features | UC-062, UC-064, UC-065 |

# 8. Feature List

| **Module** | **Submodule** | **Key Features** | **Description / Benefit** |
| --- | --- | --- | --- |
| **User Onboarding & Employee Management** | Employee Onboarding | Digital offer letters | Generate customizable, paperless offer letters with faster turnaround. |
| E-signatures | Enable candidates and HR to sign documents digitally, ensuring legal compliance. |
| Pre-joining document submission | Allow candidates to upload required documents remotely, reducing onboarding delays. |
| Employee Profile Management | Centralized employee profile | Maintain a single source of truth for employee data (contact info, job details, emergency contacts). |
| Document Management | Secure document upload | Upload and store HR/employee-related files securely. |
| Version control | Track and manage historical versions of documents for compliance. |
| Expiry alerts | Automated alerts for contract, visa, or certificate expirations. |
| Employee Offboarding | Exit surveys | Capture structured feedback from departing employees. |
| Asset tracking | Ensure company assets (ID cards, laptops) are returned during exit. |
| Auto-generated settlements | Automate full & final settlements, including payroll and benefits. |
| **Recruitment & Talent Acquisition** | Job Posting & Sourcing | Multi-platform posting | Publish jobs across job boards and LinkedIn in one click. |
| Branded job pages | Showcase employer branding to attract top talent. |
| Post scheduling | Schedule job postings for specific dates/times. |
| Candidate Management | Resume parsing | AI extracts skills and experience from resumes for faster shortlisting. |
| Candidate tagging & categorization | Classify candidates by role/skills for easy search. |
| Duplicate detection | Prevent duplicate candidate records in the talent pool. |
| Recruitment Analytics | Time-to-hire metrics | Measure and optimize average hiring duration. |
| Funnel analysis | Track candidate progress and drop-off points in the recruitment pipeline. |
| KPI dashboards | Provide visual recruitment insights for HR and leadership. |
| **Leave & Attendance Management** | Leave Management | Leave applications & approvals | Employees apply, managers approve/reject, and balances update automatically. |
| Leave balance display | Provide real-time visibility of leave balances. |
| Attendance Tracking | Biometric/Web/RFID/Geo check-ins | Support multiple attendance capture methods with real-time sync. |
| Geo-tagging | Validate employee presence through GPS-enabled check-ins. |
| Shift & Scheduling | Shift planning | Drag-and-drop planner for flexible shift creation. |
| Auto-scheduling | Automatically assign shifts based on availability and policies. |
| Overtime alerts & shift swaps | Alert managers on overtime; allow employees to swap shifts with approval. |
| **Learning & Development (LMS)** | Course Management | Built-in LMS & third-party integration | Offer a training catalog and integrate with external LMS tools. |
| Assessments | Enable quizzes/tests to track employee learning progress. |
| Employee Access & Automation | Self-enrollment | Employees can browse, filter, and enroll in courses independently. |
| Compliance training | Auto-assign mandatory trainings with reminders. |
| Certification & Insights | Completion certificates | Auto-issue certificates for completed training programs. |
| Leaderboards | Encourage healthy competition and engagement via recognition. |
| **Employee Self-Service (ESS)** | Personal Data Management | Update personal info & upload ID proofs | Employees can self-manage their data with HR verification. |
| Payroll & Benefits | Payslips & tax forms | Employees securely access/download payslips and tax-related forms. |
| Requests & Notifications | Leave requests & approval tracking | Submit leave requests and check approval status in real time. |
| Company news & announcements | Keep employees informed with HR updates and alerts. |
| **Manager Self-Service (MSS)** | Team Oversight | Team performance dashboards | Provide managers with visibility into KPIs and performance trends. |
| Task assignment & tracking | Assign/reassign tasks with deadlines and priorities. |
| Team Reporting | Customizable dashboards & exports | Real-time insights with flexible export formats (Excel, PDF, CSV). |
| Alerts & notifications | Threshold-based alerts for attendance, leave, and performance. |
| **Communication & Collaboration** | Messaging & Conferencing | 1:1 and group messaging | Facilitate secure team communication with file sharing. |
| Zoom/Teams integration | Enable scheduling and joining video meetings directly from HRMS. |
| Announcements & Alerts | Push notifications & emails | Deliver company-wide alerts and urgent messages instantly. |
| **Security & Compliance** | Access Control | Role-based access control (RBAC) | Define granular permissions to ensure secure data access. |
| Multi-factor authentication (MFA) | Enhance login security with multiple verification methods. |
| Audit & Logs | Tamper-proof activity logs | Maintain audit-ready logs for compliance tracking. |
| Data Privacy & Compliance | GDPR/ISO/SOC2 compliance | Ensure global HR data privacy and right-to-forget requests. |
| Architecture & Updates | Multi-tenant SaaS, zero downtime | Scalable architecture with seamless background updates. |

# 9. Assumptions

1. **Technology & Platform**
   * The HRMS will operate as a **multi-tenant SaaS solution** with strict data isolation per client.
   * Cloud hosting will ensure **scalability, uptime SLAs, and zero-downtime upgrades**.
   * Integration support will be available through **standardized APIs** from third-party systems (job boards, biometric devices, payroll, conferencing tools, LMS).
2. **Users & Access**
   * Employees, managers, and HR administrators will have access to **internet-enabled devices** (desktop and mobile).
   * The system will support both **web and mobile access** for ESS and MSS functionality.
   * End-users will adopt the platform following **training and onboarding sessions**.
3. **Business Rules & Policies**
   * Client organizations will provide **HR policies (leave, attendance, payroll, compliance)** for platform configuration.
   * Regional labor and tax laws will be defined by clients for **localization and compliance setup**.
   * Role-based access structures and approval workflows will be provided by client HR/IT teams.
4. **Data & Security**
   * Historical HR data from legacy systems will be provided in **standardized and clean formats** for migration.
   * Clients assume **responsibility for initial data quality** before migration.
   * All employee data will be managed in compliance with **GDPR, ISO, and SOC2 standards**.
5. **Adoption & Rollout**
   * Clients will allocate HR and IT resources for **UAT, training, and change management**.
   * Rollouts will be **phased**, beginning with core HR modules, followed by advanced features.
   * Adoption will depend on **communication, training, and change management support** from both vendor and client.

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# 10. Open Questions

| **Area** | **Question** | **Impact if Unresolved** | **Owner** |
| --- | --- | --- | --- |
| **Workflows** | What degree of workflow customization should clients have (drag-and-drop builder vs fixed templates)? | Impacts usability and scalability | Product Team |
| **Integrations** | Should conferencing tools (Zoom/Teams) be part of the MVP or roadmap? | Impacts the delivery timeline and technical integrations | Product Team |
| **Analytics** | Which dashboards/metrics are essential for MVP vs advanced roadmap? | Impacts the scope of the first release | HR Leadership & Product Team |
| **Mobile Access** | Should the mobile app include all ESS/MSS features or a light version at launch? | Impacts user adoption and development effort | Product & Engineering |
| **Adoption** | How much of change management & training will be handled by the vendor vs client HR? | Impacts rollout success and adoption rate | HR & Client Stakeholders |

# 11. Risks & Mitigations

| **Risk Area** | **Description** | **Impact** | **Mitigation Strategy** |
| --- | --- | --- | --- |
| **Data Migration Issues** | Legacy HR data may be inconsistent or incomplete. | Errors in employee records, compliance risks. | Conduct data audit, cleansing, and pilot migration before go-live. |
| **Resistance to Change** | Employees/HR staff may prefer old systems/manual processes. | Low adoption, wasted investment. | Develop a change management plan, provide training, and assign HR champions. |
| **Integration Challenges** | Difficulty connecting HRMS with ERP, attendance devices, or job boards. | Manual workarounds, delays, and duplication of data. | Use standard APIs, sandbox testing, and early IT involvement. |
| **Compliance Risks** | GDPR/ISO/SOC2 requirements not fully met. | Legal penalties, reputational damage. | Strong RBAC, data encryption, vendor certifications, and regular audits. |
| **Insufficient Training** | Users may not fully understand system features. | Underutilization, high support tickets. | Provide role-based training, knowledge base, and refresher sessions. |
| **Unrealistic Timelines** | Aggressive deadlines without proper testing. | Quality issues, rework, poor adoption. | Define MVP scope, use phased rollout, and allocate UAT time. |
| **Scalability Issues** | Rapid business growth may stress system performance. | Slower performance, inefficiency. | Design scalable SaaS architecture, auto-scaling infrastructure. |
| **Vendor Dependency** | Heavy reliance on the vendor for support and updates. | Delays in resolution, customer dissatisfaction. | SLA-based support, documentation, and client admin training. |

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# 12. Glossary

| **Term** | **Definition** |
| --- | --- |
| **SaaS (Software as a Service)** | A cloud-based delivery model where software is hosted centrally and accessed via the internet on a subscription basis. |
| **HRMS (Human Resource Management System)** | A digital platform to manage employee lifecycle processes, including onboarding, attendance, learning, and compliance. |
| **ESS (Employee Self-Service)** | A portal where employees can update personal information, request leave, submit claims, and access payslips. |
| **MSS (Manager Self-Service)** | A portal for managers to approve requests, monitor team performance, and access reports. |
| **RBAC (Role-Based Access Control)** | A security model that restricts system access based on a user’s role and responsibilities. |
| **MFA (Multi-Factor Authentication)** | A login security method requiring two or more verification factors (e.g., password + OTP). |
| **GDPR (General Data Protection Regulation)** | EU regulation for data protection and privacy of individuals. |
| **ISO (International Organization for Standardization)** | A global standard-setting body, often referenced for information security compliance. |
| **SOC 2 (System and Organization Controls 2)** | A U.S. standard for managing customer data based on trust principles like security and privacy. |
| **LMS (Learning Management System)** | A platform for managing, delivering, and tracking employee learning and training programs. |
| **KPI (Key Performance Indicator)** | A measurable value that indicates how effectively an individual or team achieves objectives. |
| **UAT (User Acceptance Testing)** | A phase where end-users test the system to validate if it meets business needs before going live. |
| **API (Application Programming Interface)** | A set of rules that allows different software applications to communicate and integrate. |
| **Multi-Tenant Architecture** | A cloud model where a single software instance serves multiple clients (tenants) with isolated data. |
| **Zero-Downtime Updates** | System upgrades performed without interrupting end-user access or availability. |